

**Reviewer Writing Assignments
for the
Director's Review of Procurement Project Support
August 08-09, 2012**

The following charge questions have primary and alternate individuals assigned for writing assignments. Sub elements to each charge question are to be addressed, in addition to any that reviewers may have are listed as well.

Charge Questions for the respective phase of each project:

1. Are there approved procurement strategies and procurement plans for Mu2e and LBNE? Are these adequate for the anticipated quantity and values of the proposed procurements on each project?

(Schaufele/ Gudagni)

- Sub element 1.1: Are the strategies tailored to each procurement, or is one method consistently used? Does the strategy match the type of procurement (R & D, commercial buy, prototype, etc)
- Sub element 1.2: How many approved strategies exist to date and how many are estimated for the project? What are the three largest procurement plans for each project and what is threshold for having an approved strategy?
- Sub element 1.3: Has any market research been performed, or do the approved strategies include milestone dates for market research.
- Sub-element 1.4: Are vendor/contractor outreach efforts identified and planned for in the strategies?

2. Have Advance Procurement Plans been identified and/or prepared as appropriate for each project? Do these plans support the projects' schedules and are appropriate procurement milestones included in the schedules? (Gudagni/Schaufele)

- Sub element 2.1: Of the existing Advance Procurement Plans, are key dates included in sufficient detail in each project schedule (Design complete, Date to Procurement, Solicitation Date, Award Date, Completion Date)?
- Sub-element 2.2: Are adequate durations included in the schedule for procurement actions depending on the complexity, dollar value, and evaluation and negotiation strategies?
- Sub-element 2.3: How many Advance Procurement Plans exist, and how many are anticipated for each project.
- Sub-element 2.4: Are DOE review and approval thresholds included in project schedules based on existing DOE approval thresholds?

3. Have the project procurement staff resources been adequately estimated and included in the respective project cost estimates throughout the life of the project? (Ingraffia/Miller)

- Sub-element 3.1: Are procurement resources direct charged to project or come out of OH charges to the project. If direct charged, how are hours and rates estimated for procurements?
- Sub-element 3.2: Do schedules reflect procurement contract administration cost estimates through contract completion if direct charged?
- Sub-element 3.3: What are the total estimated procurement staff resources, according to schedules, estimated for the life of each project? Do they match results against Sub-element 2.3 in terms of adequacy?

4. Are there sufficient resources and experience within FNAL procurement to effectively manage the types and values of the procurements anticipated on Mu2e and LBNE considering other workload?

(Miller/Ingraffia/Mantsch/Schaufele/Gudagni)

- Sub-element 4.1: List by individual each type of procurement they are capable of buying considering their background and experience. Does each of these individuals have commensurate experience performing contract administration requirements?
- Sub-element 4.2: Are there any projected staff increases anticipated to meet project procurement requirements, if so what level of procurement expertise will be sought?
- Sub-element 4.3: What are the 10 largest dollar value contracts awarded over the last 5 years and who was the buyer/administrator and what source selection methods were employed?
- Sub-element 4.4: What are each projects expectations towards procurement support, dedicated staff matrixed to the project, or obtaining support as required?
- Sub-element 4.5: Who are the planned procurement leads for each project?
- Sub-element 4.6: Are there anticipated key workforce turnovers anticipated over the next 5 years and does succession planning exist?
- Sub-element 4.7: What is the average work load over the last 3 years broken out by major contracts and simplified purchasing in terms of numbers and dollars?
- Sub-element 4.8: What is the anticipated dollar value for each project and timing over the next 5 years?